SARASOTA
County Schools

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TO: School Board Members
            Lori White, Superintendent

THROUGH: Scott Lempe, Deputy Superintendent

FROM: Kathie Ebaugh, AICP, Planning Director

DATE: December 1, 2016

RE: Goal Setting for 2017/2018 CIP

On January 17, 2017 the Sarasota County School Board will start reviewing the 2017/2018 Capital Improvements Plan. At the December 6, 2016, Board Workshop, we will start the process of developing the 2016/2017 Capital Improvement Plan (CIP) with a workshop aimed at setting next year's capital goals. Specifically, at the workshop we will review with the Board this year's goals and objectives in order to ensure that the capital budget aligns with these goals.

The intent of the workshop is to give the School Board and opportunity to provide staff direction about how to draft the 2016/17 CIP goals and objectives. Holding a goal setting workshop before a draft has been prepared will enable the School Board to become more proactive in establishing and identifying future capital goals and budget priorities. As a result of this capital planning process, the resulting CIP documents will reflect the Board's vision for our schools futures.

In order to help the board prepare for this workshop, a copy of the proposed 2015/16 goals and objectives have been included as read ahead materials.

CIP Goals and Objectives

GOAL 1: EDUCATION SERVICES PLANNING AND SCHOOL FACILITIES CAPACITY PLANNING.

Meet the needs and demands of current and future residents and businesses ~~and ensure that current and future educational service needs are met~~ through planning efforts that provide for current student populations, ~~prepare for~~ future student demands, and ~~provide for~~ the educational ~~facility~~ needs of Sarasota County ~~in order to meet the needs and demands of current and future residents and businesses.~~

~~Policy~~ Objective 1.1. Level of Service Provision. Ensure that current and future educational demands are met through planning efforts that provide for ~~current student populations, prepare for future student demands, and meet~~ the adopted Level of Service for School Facilities by:

   a. Addressing growth management needs and ensuring school facilities provide for changes in development patterns, growth corridors, and demographic populations;
   b. Maintaining a ~~level of service standards and~~ concurrency management system that ensures the educational services and facilities are provided in appropriate locations;
   c. Collaborating with local governments to review and evaluate proposed residential development projects to ensure ~~growth is concurrent with the provision of educational services~~ that educational services respond to growth;
   d. Working with Manatee and Charlotte County Schools to coordinate the delivery of educational services by evaluating interlocal agreements, facility demands, population changes, and student reassignments.

~~Policy~~ Objective 1.2. Educational Service and Program Planning. ~~Incorporate long-term planning for instructional programs to~~ Ensure educational services are able to adapt to changes in district strategic priorities, student population demands, and capital funding capabilities by: ~~Such a system will enable the district to:~~

   a. Prioritizing future school rebuilds, expansions, and construction according to facility needs, conditions, locations, and budget;
   b. Utilizing relocatable structures as a ~~temporary~~ planning tool to respond to growth and in order to minimize and reduce the dependence on such facilities;
   c. Maximizing facility utilization through program relocations, attendance zone changes, or student assignment measures; and
   d. Purchasing new school facilities sites necessary to support long-range needs and growth demands.

~~Policy~~ Objective 1.3. Shared-Use Facilities and Co-located Services. Maximize the utilization of district facilities, capital assets, and fiscal resources by proactively identifying opportunities to develop shared-use facilities and co-locate services with both internal and external partners—e.g.: local, regional, and state government entities, community groups, neighborhood associations, and non-for-profit agencies. Opportunities to partner on the delivery of services and facilities include:

   a. Joint-venture services and buildings such as arts centers, transportation storage yards and maintenance facilities, libraries, meeting rooms, auditoriums, conference centers, and other community resources;
   b. Recreational facilities and resources such as playgrounds, sport fields, and indoor sport venues, and other facilities;
   c. Support facilities such as warehouses, parts inventory, instructional television, print shop, media studios, and similar services; and
   d. Shared-use schools sites and buildings—particularly in the Englewood attendance zone area with Charlotte County.

GOAL 2: ASSET PRESERVATION.

Protect the district's capital investments through a well-managed operations system that establishes best management practices for maintaining, renovating, or replacing the district's capital assets—e.g.: facilities, systems, equipment, transportation equipment, and other resources.

~~Policy~~ Objective 2.1. Capital Asset Operations Evaluations. Ensure the district's capital assets provide for the educational and operations needs of the district by continually evaluating how such resources are utilized. Particular emphasis shall be to ensure that district's capital assets:
   a. Are operating efficiently and effectively;
   b. Meet the educational needs and demands of the district's students and educators; and
   c. Guarantee safe, up-to-date facilities that meet diverse program needs.

~~Policy~~ Objective 2.2. Preventative Maintenance Schedule. Ensure the district's capital assets are well kept by implementing preventative maintenance schedules for each capital asset and addressing projects related to all appropriate assets including the following resources:
   a. School Facilities and Properties—e.g.: roofs, flooring replacement, major systems, playgrounds, relocatables, traffic improvements including resurfacing, expansion, and on-site queuing;
   b. Safety and Security Resources—e.g.: fire and life safety systems, fencing and single points of entry, cameras, locking systems, and access controls;
   c. Technology Systems—e.g.: computer replenishment, interactive instructional displays, learning management systems, virtual learning, streaming video, intercoms, telephones and servers; and
   d. Transportation Equipment and Vehicles—e.g.: school buses and white fleet.

~~Policy~~ Objective 2.3. Capital Improvement Priorities. Determine when to replace, construct, or purchase capital assets by evaluating each proposal according to a set of established priorities that considers issues related to need, user demand, cost, and influence on the overall ability to deliver educational services. As part of this evaluation, make certain to address local, state, and federal programs, statutes, and regulatory requirements.
~~Policy~~ Objective 2.4. Coordinated Operations. Provide for the coordinated review, management, and oversight of capital asset operations by building and utilizing interdepartmental capital facility planning teams—including staff from Planning, Construction, Facilities, Finance, Information Technologies, Safety and Security, and the Deputy Superintendent—to:
   a. Collaborate on the planning, design, and implementation of capital improvement projects;
   b. Coordinate the prioritization and review of proposed capital improvements;
   c. Bring forward the capital improvement needs and interests of the school administrations;
   d. Ensure effective and efficient project management and program implementation; and
   e. Maximize district capital resources by seeking opportunities to reduce project redundancies.

GOAL 3: SAFETY AND SECURITY.

Support the academic success of each child with a comprehensive safety and security program and services that effectively uses security technologies and infrastructure aligned with campus security and emergency management best practices.

~~Policy~~ Objective 3.1. Campus Access. Manage access to campus through:
   a. Renovation of main office entrances to limit visitor access to the student side of the campus, designating single points of entry controlled with electronic access control and computerized visitor management tools; and
   b. Functional fencing, gates, bollards, and security window film to control access and increase stand-off distance.

~~Policy~~ Objective 3.2. Campus Security. Establish safe internal campus security by: Upgrading classroom and administrative support doors with keysets that lock from the inside, and, where appropriate, implement electronic access control.

~~Policy~~ Objective 3.3. Security Technology. Utilize technology that helps monitor campus activities and ensure effective emergency management communication including:
   a. Video security cameras with a migration path to ensure reliability through upgrades and enhancements;
   b. Redundant emergency communication/mass notification methods for visible and audible emergency messaging, including automated notification of severe weather conditions for outdoor venues;
   c. Reliable campus two-way radio communication systems and interoperable two-way communications for direct communication with first responder agencies, including in-building bi-directional amplifiers where required; and
   d. <u>Evaluate the feasibility and functionality of a separate technology infrastructure system that meets the future needs of security technology.</u>

GOAL 4: TECHNOLOGY.

Implement and support technology infrastructure to ensure students and staff have anytime, anywhere access to the latest educational technology and resources.

~~Policy~~ Objective 4.1. Technology Network Infrastructure. Support the district's educational programs and operations system by establishing a technology network infrastructure system that enables all other technology components to maximize their usefulness and potential. Increase the capacity of the district's technology infrastructure system by:
   a. Partnering with Sarasota County Government's IT Department to ~~build~~ evaluate, maintain, and operate a jointly ~~owned~~ used fiber ring throughout the county to serve all of our schools and department sites; and
   b. Replacing and upgrading the wired and wireless Local Area Network (LAN) and continually upgrading and replacing out of date equipment.

~~Policy~~ Objective 4.2. Classroom and School Technology Equipment. Improve the overall educational experience of our students and staff though classroom and school technology equipment that puts technology tools (e.g.: projectors, interactive whiteboards/panels, student response devices, voice enhancement systems, document cameras, and interactive teaching peripherals) in the hands of our students and staff. Particular emphasis shall be on:
   a. Exploration, implementation and support of options regarding mobile digital devices for student use in the classroom and for assessment;
   b. Implementing an interactive panel display replenishment program that provides an updated classroom instructional tool for staff at all schools in the district;
   c. Support of the schools' auditorium systems ability to utilize up-to-date technology for the benefit of student learning as well as school and community events and performances; and
   d. Implementing a computer replenishment program that provides an equitable model and computer platform to all schools in the district.

~~Policy~~ Objective 4.3. District wide Technology Infrastructure. Enable the district to utilize technology to support both instructional and business functions throughout the entire district and ensure that the district is able to function at high level through support technology infrastructure systems that include:
   a. Technology funds necessary to support our learning management systems, virtual learning, streaming video, video conferencing, individualized learning system, and reading progress monitoring;
   b. District wide communications technology including intercoms, clocks, and telephones; and
   c. Computing infrastructure replacements and upgrades necessary to support blades, school servers, and television studios.

GOAL 5: CAPITAL IMPROVEMENT FUNDING.

Execute a capital improvement financing strategy that plans, maintains, and provides for the delivery of a highly valued, well managed, and fiscally responsible educational services and infrastructure system.

~~Policy~~ Objective 5.1. Capital Improvement Planning. ~~Ensure that developments do not exceed the district's ability to~~ Provide ~~these~~ for capital improvements in accordance with established service priorities and capital asset needs by establishing a CIP which identifies and prioritizes all capital improvement projects which the district will undertake. The CIP shall include projects which:
   a. ~~Meet~~ Address existing deficiencies and augment existing operations;
   b. Provide repair or replacement of existing facilities; and
   c. Accommodate planned future growth.
   d. ~~Address maintenance needs that result from future growth.~~

~~Policy~~ Objective 5.2. Five-year CIP. Provide for the current capital needs of the school district by establishing the district's immediate capital priorities, funding strategies, and five-year capital improvement priorities by:
   a. Completing an annual assessment of potential capital projects to ensure that current and future capital assets meet the district's establish strategic goals, are properly accounted for in the district's budgeting practices, and achieve previously established project priorities;
   b. Evaluating potential projects for inclusion on the five-year CIP according to criteria that considers issues related to: need to correct deficiency, repair or replace facility, accommodate new growth; project location and student considerations; community interests and demands; projected estimated cost and fiscal capabilities; and priority ranking relative to other proposed projects and capital needs; and
   c. Ensuring that the district does not add new projects to the five-year CIP unless there is an overriding demonstrated need for the project, new funding revenues are found that help finance the project, or the project is shown to meet a strategic goal of the district.

~~Policy~~ Objective 5.3. Capital Asset Utilization and Financing. Promote life-cyle cost management practices that improve the efficiency and effectiveness of education systems and services through the following practices:
   a. Maintenance, operation, and construction practices that reduce capital costs, promote efficient use of financial resources, and increase capital asset use and functionality; and
   b. Reinvestment of monies saved through such practices back into the district's capital assets so that additional savings may be realized.

~~Policy~~ Objective 5.4. Funding Mechanism Assessments. Ensure that development bears a proportionate share of needed facility improvements both now and in the future by regularly evaluating:
   a. Whether present fees are adequate to address the impacts of inflation;
   b. Whether the district needs to adjust impact fees, as appropriate; and
   c. Whether other capital financing mechanisms may be needed and used to help meet the fiscal demands placed on the district by new development.

~~Policy~~ Objective 5.5. Capital Project Budget. Implement~~ing~~ the Capital Projects budget ~~requires~~ through a collaborative team of Planning, Construction, Facilities, Finance, Information Technologies, Safety and Security, the Deputy Superintendent, and instructional leaders to systematically:

    a. Develop a list of ~~small [i.e., less than $50,000] instructional, safety~~ projects ~~by site~~;

    b. Rank the ~~requests~~ projects as to priority; and

    c. Ensure adequate funding for ~~as many as possible~~ the District's priorities.